

UNITED STATES DISTRICT COURT
FOR THE WESTERN DISTRICT OF WASHINGTON
AT SEATTLE

REINE HARRIS, an individual, ROMAIN
HARRIS, an individual, and marital
community,

Plaintiff,

v.

SAFECO INSURANCE COMPANY OF
AMERICA, a foreign corporation,

Defendant.

CASE NO. 2:23-cv-00618-BJR

**AMENDED STIPULATED
PROTECTIVE ORDER**

1. PURPOSES AND LIMITATIONS

The parties have met and conferred prior to the filing of this Stipulated Motion. Discovery in this action is likely to involve production of confidential, proprietary, or private information for which special protection may be warranted. Accordingly, the parties hereby stipulate to and petition the court to enter the following Stipulated Protective Order. The parties acknowledge that this agreement is consistent with LCR 26(c). It does not confer blanket protection on all disclosures or responses to discovery, the protection it affords from public disclosure and use extends only to the limited information or items that are entitled to confidential treatment under the applicable legal principles, and it does not presumptively entitle parties to file confidential information under seal.

2. “CONFIDENTIAL” MATERIAL

“Confidential” material shall include the following documents and tangible things produced or otherwise exchanged:

- Safeco’s Underwriting Materials;
- Claims reference and training documents, including but not limited to document used in the training of Safeco employees, used as reference by Safeco, and or/any other document reflecting Safeco’s claims processes and procedures;
- To the extent compelled to produce, Safeco designates any materials that relate to individual employees, performance measures, or any other personnel issue;
- To the extent compelled to produce, any and all psychiatric treatment and/or mental health counseling records;
- Plaintiffs’ financial records, including but not limited to bank statements and credit card statements.

3. SCOPE

The protections conferred by this agreement cover not only confidential material (as defined above), but also (1) any information copied or extracted from confidential material; (2) all copies, excerpts, summaries, or compilations of confidential material; and (3) any testimony, conversations, or presentations by parties or their counsel that might reveal confidential material. However, the protections conferred by this agreement do not cover information that is in the public domain or becomes part of the public domain through trial or otherwise.

4. ACCESS TO AND USE OF CONFIDENTIAL MATERIAL

4.1 Basic Principles. A receiving party may use confidential material that is disclosed or produced by another party or by a non-party in connection with this case only for prosecuting, defending, or attempting to settle this litigation. Confidential material may be disclosed only to the

1 categories of persons and under the conditions described in this agreement. Confidential material
2 must be stored and maintained by a receiving party at a location and in a secure manner that ensures
3 that access is limited to the persons authorized under this agreement.

4 4.2 Disclosure of “CONFIDENTIAL” Information or Items. Unless otherwise ordered
5 by the court or permitted in writing by the designating party, a receiving party may disclose any
6 confidential material only to:

7 (a) the receiving party’s counsel of record in this action, as well as employees
8 of counsel to whom it is reasonably necessary to disclose the information for this litigation;
9

10 (b) the officers, directors, and employees (including in house counsel) of the
11 receiving party to whom disclosure is reasonably necessary for this litigation, unless the parties
12 agree that a particular document or material produced is for Attorney’s Eyes Only and is so
13 designated;
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15 (c) experts and consultants who have signed the “Acknowledgment and
16 Agreement to Be Bound” (Exhibit A) and whose analysis receiving party’s counsel of record
17 reasonably believes would be assisted by access to the confidential material;

18 (d) the court, court personnel, and court reporters and their staff;

19 (e) copy or imaging services retained by counsel to assist in the duplication of
20 confidential material, provided that counsel for the party retaining the copy or imaging service
21 instructs the service not to disclose any confidential material to third parties and to immediately
22 return all originals and copies of any confidential material;
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24 (f) In preparation for and during their depositions, witnesses in the action to
25 whom counsel of record reasonably believes disclosure is reasonably necessary and who have
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1 signed the “Acknowledgment and Agreement to Be Bound” (Exhibit A), unless otherwise agreed
2 by the designating party or ordered by the court. Any person presented as a witness pursuant to
3 Fed. R. Civ. P. 30(b)(6) must sign Exhibit A before being provided confidential material produced
4 by another party. Pages of transcribed deposition testimony or exhibits to depositions that reveal
5 confidential material must be separately bound by the court reporter and may not be disclosed to
6 anyone except as permitted under this agreement;
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8 (g) the author or recipient of a document containing the information or a
9 custodian or other person who otherwise possessed or knew the information.

10 4.3 Filing Confidential Material. Before filing confidential material or discussing or
11 referencing such material in court filings, the filing party shall confer with the designating party,
12 in accordance with Local Civil Rule 5(g)(3)(A), to determine whether the designating party will
13 remove the confidential designation, whether the document can be redacted, or whether a motion
14 to seal or stipulation and proposed order is warranted. During the meet and confer process, the
15 designating party must identify the basis for sealing or redacting the specific confidential
16 information at issue, and the filing party shall include this basis in its motion to seal, along with
17 any objection to sealing or redacting the information at issue. Local Civil Rule 5(g) sets forth the
18 procedures that must be followed and the standards that will be applied when a party seeks
19 permission from the court to file material under seal. A party who seeks to maintain the
20 confidentiality of its information must satisfy the requirements of Local Civil Rule 5(g)(3)(B),
21 even if it is not the party filing the motion to seal. Failure to satisfy this requirement will result in
22 the motion to seal being denied, in accordance with the strong presumption of public access to the
23 Court’s files.
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1 5. DESIGNATING PROTECTED MATERIAL

2 5.1 Exercise of Restraint and Care in Designating Material for Protection. Each party
3 or non-party that designates information or items for protection under this agreement must take
4 care to limit any such designation to specific material that qualifies under the appropriate
5 standards. The designating party must designate for protection only those parts of material,
6 documents, items, or oral or written communications that qualify, so that other portions of the
7 material, documents, items, or communications for which protection is not warranted are not swept
8 unjustifiably within the ambit of this agreement.
9

10 Mass, indiscriminate, or routinized designations are prohibited. Designations that are
11 shown to be clearly unjustified or that have been made for an improper purpose (*e.g.*, to
12 unnecessarily encumber or delay the case development process or to impose unnecessary expenses
13 and burdens on other parties) expose the designating party to sanctions.
14

15 If it comes to a designating party's attention that information or items that it designated for
16 protection do not qualify for protection, the designating party must promptly notify all other parties
17 that it is withdrawing the mistaken designation.

18 5.2 Manner and Timing of Designations. Except as otherwise provided in this
19 agreement (see, *e.g.*, second paragraph of section 5.2(b) below), or as otherwise stipulated or
20 ordered, disclosure or discovery material that qualifies for protection under this agreement must
21 be clearly so designated before or when the material is disclosed or produced.
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23 (a) Information in documentary form: (*e.g.*, paper or electronic documents and
24 deposition exhibits, but excluding transcripts of depositions or other pretrial or trial proceedings),
25 the designating party must affix the word "CONFIDENTIAL" to each page that contains
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1 confidential material. If only a portion or portions of the material on a page qualifies for protection,
2 the producing party also must clearly identify the protected portion(s) (*e.g.*, by making appropriate
3 markings in the margins).

4 (b) Testimony given in deposition or in other pretrial proceedings: the parties
5 and any participating non-parties must identify on the record, during the deposition or other pretrial
6 proceeding, all protected testimony, without prejudice to their right to so designate other testimony
7 after reviewing the transcript. Any party or non-party may, within fifteen days after receiving the
8 transcript of the deposition or other pretrial proceeding, designate portions of the transcript, or
9 exhibits thereto, as confidential. If a party or non-party desires to protect confidential information
10 at trial, the issue should be addressed during the pre-trial conference.

11 (c) Other tangible items: the producing party must affix in a prominent place
12 on the exterior of the container or containers in which the information or item is stored the word
13 “CONFIDENTIAL.” If only a portion or portions of the information or item warrant protection,
14 the producing party, to the extent practicable, shall identify the protected portion(s).

15 5.3 Inadvertent Failures to Designate. If timely corrected, an inadvertent failure to
16 designate qualified information or items does not, standing alone, waive the designating party’s
17 right to secure protection under this agreement for such material. Upon timely correction of a
18 designation, the receiving party must make reasonable efforts to ensure that the material is treated
19 in accordance with the provisions of this agreement.

20 6. CHALLENGING CONFIDENTIALITY DESIGNATIONS

21 6.1 Timing of Challenges. Any party or non-party may challenge a designation of
22 confidentiality at any time. Unless a prompt challenge to a designating party’s confidentiality
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1 designation is necessary to avoid foreseeable, substantial unfairness, unnecessary economic
2 burdens, or a significant disruption or delay of the litigation, a party does not waive its right to
3 challenge a confidentiality designation by electing not to mount a challenge promptly after the
4 original designation is disclosed.

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6 6.2 Meet and Confer. The parties must make every attempt to resolve any dispute
7 regarding confidential designations without court involvement. Any motion regarding confidential
8 designations or for a protective order must include a certification, in the motion or in a declaration
9 or affidavit, that the movant has engaged in a good faith meet and confer conference with other
10 affected parties in an effort to resolve the dispute without court action. The certification must list
11 the date, manner, and participants to the conference. The party challenging the designation shall
12 initiate the dispute resolution process by providing written notice of each designation it is
13 challenging and describing the basis for each challenge. The parties shall attempt to resolve each
14 challenge in good faith within 14 days of the service of notice. A good faith effort to confer requires
15 a face-to-face meeting or a telephone conference.

16
17 6.3 Judicial Intervention. If the parties cannot resolve a challenge without court
18 intervention, the designating party may file and serve a motion to retain confidentiality under Local
19 Civil Rule 7 (and in compliance with Local Civil Rule 5(g), if applicable, and in compliance with
20 the Standing Order issued in this case, ECF No. 15). The burden of persuasion in any such motion
21 shall be on the designating party. Frivolous challenges, and those made for an improper purpose
22 (e.g., to harass or impose unnecessary expenses and burdens on other parties) may expose the
23 challenging party to sanctions. All parties shall continue to maintain the material in question as
24 confidential until the court rules on the challenge.
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1 7. PROTECTED MATERIAL SUBPOENAED OR ORDERED PRODUCED IN OTHER
 2 LITIGATION

3 If a party is served with a subpoena or a court order issued in other litigation that compels
 4 disclosure of any information or items designated in this action as “CONFIDENTIAL,” that party
 5 must:

6 (a) promptly notify the designating party in writing and include a copy of the
 7 subpoena or court order;

8 (b) promptly notify in writing the party who caused the subpoena or order to
 9 issue in the other litigation that some or all of the material covered by the subpoena or order is
 10 subject to this agreement. Such notification shall include a copy of this agreement; and

11 (c) cooperate with respect to all reasonable procedures sought to be pursued by
 12 the designating party whose confidential material may be affected.

13 8. UNAUTHORIZED DISCLOSURE OF PROTECTED MATERIAL

14 If a receiving party learns that, by inadvertence or otherwise, it has disclosed confidential
 15 material to any person or in any circumstance not authorized under this agreement, the receiving
 16 party must immediately (a) notify in writing the designating party of the unauthorized disclosures,
 17 (b) use its best efforts to retrieve all unauthorized copies of the protected material, (c) inform the
 18 person or persons to whom unauthorized disclosures were made of all the terms of this agreement,
 19 and (d) request that such person or persons execute the “Acknowledgment and Agreement to Be
 20 Bound” that is attached hereto as Exhibit A.

21 9. INADVERTENT PRODUCTION OF PRIVILEGED OR OTHERWISE PROTECTED
 22 MATERIAL

1 When a producing party gives notice to receiving parties that certain inadvertently
2 produced material is subject to a claim of privilege or other protection, the obligations of the
3 receiving parties are those set forth in Federal Rule of Civil Procedure 26(b)(5)(B). This provision
4 is not intended to modify whatever procedure may be established in an e-discovery order or
5 agreement that provides for production without prior privilege review. The parties agree to the
6 entry of a non-waiver order under Fed. R. Evid. 502(d) as set forth herein.
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8 10. NON TERMINATION AND RETURN OF DOCUMENTS

9 Within 60 days after the termination of this action, including all appeals, each receiving
10 party must return all confidential material to the producing party, including all copies, extracts and
11 summaries thereof. Alternatively, the parties may agree upon appropriate methods of destruction.
12 This includes confidential information contained within expert reports or deposition or hearing
13 transcripts.
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15 Notwithstanding this provision, counsel are entitled to retain one archival copy of all
16 documents filed with the court, trial, deposition, and hearing transcripts, correspondence,
17 deposition and trial exhibits, expert reports, attorney work product, and consultant and expert work
18 product, even if such materials contain confidential material. An expert witness may retain one
19 archival copy of that witnesses' expert report, deposition transcript.
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21 The confidentiality obligations imposed by this agreement shall remain in effect until a
22 designating party agrees otherwise in writing or a court orders otherwise.
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1 IT IS SO STIPULATED, THROUGH COUNSEL OF RECORD.

2
3 Friday, April 12, 2024

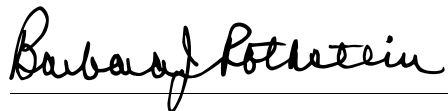
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1 PURSUANT TO STIPULATION, IT IS SO ORDERED

2 IT IS FURTHER ORDERED that pursuant to Fed. R. Evid. 502(d), the production of any
3 documents, electronically stored information (ESI) or information, whether inadvertent or
4 otherwise, in this proceeding shall not, for the purposes of this proceeding or any other federal or
5 state proceeding, constitute a waiver by the producing party of any privilege applicable to those
6 documents, including the attorney-client privilege, attorney work-product protection, or any other
7 privilege or protection recognized by law. This Order shall be interpreted to provide the maximum
8 protection allowed by Fed. R. Evid. 502(d). The provisions of Fed. R. Evid. 502(b) do not apply.
9 Nothing contained herein is intended to or shall serve to limit a party's right to conduct a review
10 of documents, ESI or information (including metadata) for relevance, responsiveness and/or
11 segregation of privileged and/or protected information before production. Information produced
12 in discovery that is protected as privileged or work product shall be immediately returned to the
13 producing party.

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15 DATED: April 12, 2024

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18 Barbara J. Rothstein
19 United States District Court Judge
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EXHIBIT AACKNOWLEDGMENT AND AGREEMENT TO BE BOUND

I, _____ [print or type full name], of
_____ [print or type full address], declare under penalty of
perjury that I have read in its entirety and understand the Stipulated Protective Order that was
issued by the United States District Court for the Western District of Washington on [date] in the
case of *Harris v. Safeco Insurance Company of America*, No. 2:23-cv-00618-BJR I agree to
comply with and to be bound by all the terms of this Stipulated Protective Order and I understand
and acknowledge that failure to so comply could expose me to sanctions and punishment in the
nature of contempt. I solemnly promise that I will not disclose in any manner any information or
item that is subject to this Stipulated Protective Order to any person or entity except in strict
compliance with the provisions of this Order.

I further agree to submit to the jurisdiction of the United States District Court for the
Western District of Washington for the purpose of enforcing the terms of this Stipulated Protective
Order, even if such enforcement proceedings occur after termination of this action.

Date: _____

City and State where sworn and signed: _____

Printed name: _____

Signature: _____